



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**July 15, 2019**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2017 actuals  
FY 2018 annual targets  
FY 2018 actuals  
FY 2018 actuals as a percentage of annual targets  
FY 2018 actuals as a percentage of FY 2017 actuals  
FY 2019 actuals to date  
FY 2019 annual targets  
FY 2019 actuals as a percentage of FY 2019 annual targets

**The general target is 100% for FY 2019, July 1, 2018-June 30, 2019**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- The data in this report represents activity through the end of the fiscal year for most measures. The numbers in the “Total Last Report” column have been updated to reflect May data that was not available at the time of the June report.
- The **# of unduplicated clients receiving Independent Living Services** has reached the target for the year. While June’s numbers are not yet available, we anticipate them being small as we are just now beginning to put some people from the waiting list onto services.
- The **# of individuals receiving Meals on Wheels** was 16% under target for the year but 7% higher than FY 2018. We have the capacity to serve more clients/meals and so are planning for increased outreach for FY 2020.
- The **# of seniors receiving Congregate Meals** was 28% above target for the year and 9.5% higher than FY 2018. The AOA dining room continues to draw large numbers of older adults.
- The **# of unduplicated Eagle Transit Dial-A-Ride riders** was 26% under target due to the elimination of paratransit in Evergreen at the beginning of the fiscal year and the restructuring of routes in Kalispell to support DAR riders to more easily use fixed route service.
- The **% of service recipients at moderate to high risk of institutionalization** was 93% in June, with a range of 87%-93% for the year at an average of 89%.
- **Overall client satisfaction with AOA services** was 97%, exceeding the target by 2%.
- We experienced far fewer than expected **complaints related to Eagle Transit** services for the year, which we believe is the result of improved routes and services over this fiscal year.

- **Outreach/Education** efforts ended 8% above target for the year due to BEC grant related outreach.
- **Meals/Nutrition** - Total meals served were 2% under target and 3% lower than last year.
- **Transportation**
  - Total rides were 116,017, passing the 100,000 threshold for the first time, exceeding the annual target by 29% and ending 17% above the total rides provided last fiscal year.
  - Excluding seasonal rides within Glacier National Park, we provided 15,495 more rides than last year.
  - The total ridership growth this year was in the fixed and commuter routes, exceeding the target by 49%. While some of this increased ridership is related to our Glacier National Park Cooperative Agreement and the addition of the City of Kalispell Parks-n-Rec after school route, rides on the previously underperforming Kalispell fixed route were up 2,637 over FY 2018. In addition, in 6 months of operation the new Orange Line provided 3,062 rides, bringing the overall increase in rides on Kalispell fixed routes to 5,699.
  - Our Dial-A-Ride (DAR) service, which consists of paratransit rides in Kalispell plus premium DAR rides in Evergreen and west of Kalispell, provided 16% fewer rides than last year when all DAR rides were paratransit rides related to the Kalispell/Evergreen fixed route. Overall DAR rides were 11% below target for the year. However, many paratransit riders are now taking the Orange Line as it picks up at the front door of many senior and subsidized apartment complexes. Additionally, we are also considering implementation of a new fixed route tentatively called the Blue Line that would provide an alternative to paratransit eligible passengers wanting to travel to Kalispell Regional, other health care providers and local pharmacies.
- **Information and Referral/Assistance Contacts** are 45% above target for the year and 34% higher than last year.
- **Independent Living Services**
  - The “unit of service” numbers are up-to-date through May. We’ve reached our target for homemaker and exceeded it for personal care but are significantly below target for the other services. We do not anticipate reaching our target for these services by the end of the fiscal year and will carry-forward the remaining federal funding into the next fiscal year.
- **Benefits Counseling**
  - We substantially exceeded our target due to our Benefits Enrollment Center grant outreach efforts, a greater than expected number of individuals requesting assistance during Medicare Open Enrollment and the addition of several extra Medicare 101 classes. We expect this pace to continue and are implementing staffing changes to better meet the growing need.
- **Ombudsman**
  - Ombudsman cases slightly exceeded the target.

## **AOA Administration**

### ***Budget and Contracts***

- An amendment to our DPHHS contract to provide us with \$2,000 to support local community outreach volunteers working on behalf of the Department’s Alzheimer’s grant from the Administration on Community Living is on the Commissioners’ agenda for signature today.
- We will complete a final FY 2019 budget reconciliation and report for DPHHS once Finance has completed accruals.
- We are working on our FY 2020 budget for DPHHS, which includes a continuation of the federal finding increases from FY 2019 as well as a very slight increase in state funding.
- The 6-month financial report for the BEC grant is due at the end of this month.

- Staff submit financial reports monthly to DPHHS.

### ***Building***

- No changes will be made to the Senior Center Activity Room at this time.

### ***HR/Staff Development***

- We currently have three AOA positions that we are in the process of filling.

### **State/Federal/Legislative Issues**

- Area Plan on Aging: We received a letter from DPHHS dated July 5, 2019 informing us our Area Plan on Aging effective October 2019-September 2022 has been approved.
- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa will attend the quarterly meeting in Helena in August.
  - Lisa continues to participate on two subcommittees that assist the DPHHS State Unit on Aging with contract administration and program improvement: Budget and Funding and Legal Services.
  - M4A is providing input and information to the Children and Families Interim Committee in support of its study of Senior and Long-Term Care.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expires at the end of September.
  - Lisa will attend the annual n4a conference July 26-31 in New Orleans with a focus on diversification of funding and best practices in service provision.

### **AOA Advisory Council**

- The Council met on July 11<sup>th</sup>. Members reviewed the role of the Council as required by the Older Americans Act and current bylaws and discussed ways to improve Council operations. Members agreed to focus on Council member recruitment and development in the near term.
- The next meeting is September 12, 2019.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

#### ***May***

- May 2019, 48 BEC ads per month on KGEZ
- May 2019, promotion of BEC outreach in Hungry Horse
- May 2019, promotion of Medicare 101 classes
- 5/4/19, annual volunteer recognition luncheon, 100
- 5/6/19, monthly interview on KGEZ, 15,000
- 5/16/19, reported on results of Area Plan on Aging survey to Kalispell Noon Rotary, 60
- 5/17/19, presentation on aging/respite at Immanuel Lutheran Communities Foundation event, 100
- 5/22/19, NWMT Care Transitions Coalition, 68
- 5/28/19, Medicare 101 class, 22
- 5/30/19, Medicare counseling/BEC outreach in Hungry Horse, 75

#### ***June***

- June 2019, 48 BEC ads per month on KGEZ
- June 2019, promotion of the annual Older Americans' Picnic

- 6/3/19, monthly interview on KGEZ, 15,000
- 6/5/19, interview KOFI, Wendy Ostrum Price, 17,000
- 6/8/19, NWMT Veterans Stand Down, 150
- 6/14/19, 41<sup>st</sup> Annual Older Americans' Picnic, 493
- 6/25/19, Medicare 101 class, 12
- 6/25/19, BEC ad, Montana 55 Magazine, Housing Guide edition, 30,000
- 6/27/19, BEC outreach in Hungry Horse at the Community Clinic, 10

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - A meeting has been set between the Glacier National Park Cooperative Agreement (CA) partners for September 4, 2019 to discuss findings from the recent trip to Acadia National Park and how we might restructure our CA to improve operations within GNP and enhance local transit in the Flathead County communities impacted by Park visitorship.
  - Fourth quarter financial, program and vehicle reports are due July 31, 2019. However, as in years past we have received permission to submit them in mid-September once the county has closed its books.
- Outreach/Education/Media/Special Events:
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in May and June.
  - On 5/20/19, staff participated in the Real Life Fair for Students in Transition at FVCC
- Operations:
  - We continue to look for funding options, including restructuring of existing resources and private partnerships, to implement a new Blue Line in Kalispell that would provide door to door fixed route service from senior and other apartment complexes to the medical complex and local pharmacies to reduce passengers' dependence on paratransit for medical rides. There is a lot of community interest in this option.
- Staff Development/Training:
  - Nothing to report.
- Transportation Advisory Committee (TAC)
  - The next meeting will be August 1<sup>st</sup>. This will be a regular meeting. There will be no trip to GNP this year.
- Glacier National Park
  - The hiker-biker service, which was funded by the Glacier Conservancy this year, provided 4,637 rides between Mother's Day weekend and the start of the regular season on July 1<sup>st</sup>.
  - Commuter service from Kalispell to the Park began on July 1<sup>st</sup> and as of July 9<sup>th</sup> had provided 1,082 rides from outside to within the Park, including 186 rides on July 4<sup>th</sup>. The total last year was 1,400 (July 1<sup>st</sup>-August 12<sup>th</sup> when the Park closed due to fires).
  - Total ridership as of July 9<sup>th</sup> is 28,426.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- Details of the 41<sup>st</sup> Annual Older Americans' Picnic
  - 493 people attended
  - We raised \$4,200 from local sponsors to support the picnic, including:

- Gold Sponsors: A Plus Health Care, Bailey Insurance Services, Kalispell Regional Health Care
- Silver Sponsors: Addus Homecare, Flathead Electric Coop, Frontier Hospice, Glacier Bank, Humana, Loyal Care, Montana Coffee Traders, United Way
- Bronze Sponsors: Berube Physical Therapy, Home Consignment and Auction
- Other: Albertsons, Home Options, Rosauers, Super One, The Springs of Whitefish
- The program included an address by Senator Jon Tester and a letter from Senator Steve Daines, music by the Sunshine Chorus, and thoughts from attendees about what they enjoy about aging.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- DPHHS is replacing its three outdated databases with one new database. Our Outreach Coordinator has served on the committee formed to provide input to the state and assist with testing. Other staff have attended training on the new system. The transition has begun with two of the three old databases no longer accessible for entering or retrieving data. Once everything is up and running and the bugs have been worked out it should cut down on the amount of time our staff have to spend doing data entry, and it should be easier for us to get useful reports from the system.
- I&A/Benefits Counseling/BEC:
  - We are in the process of filling a vacant Resource Specialist position.
  - As part of the BEC grant, our Community Outreach Coordinator (along with staff from Area VI) attended the annual National Council on Aging (NCOA) conference 6/17-6/12 in Washington, D.C.
- Veteran Directed HCBS Program:
  - We are in the process of filling the Care Coordinator position and are on track to complete the transition of the program from the Area VI Agency on Aging on September 1<sup>st</sup>.
- Independent Living Services:
  - We have only been able to bring a few clients off the waiting list due to vacant staff positions.

### **Senior Mobile Home Repair**

- The SMHR program is now part of the Flathead Community Foundation and we have transferred the balance of the program funds.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lakeside Chapel is temporarily unable to offer meals due to lack of staff/volunteers. We will suspend congregate meals for the area for a few months and AOA staff/volunteers will manage the home delivered meals until the situation is resolved. If it appears this is more than a temporary issue, we will look for another partner.
- We continue to work with all stakeholders regarding the Bigfork Community Center.



# July 2019 Report: Performance Measures Tables - June 2019 stats (FY 2019)

100.00%

MEASURE	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	June	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
# Receiving Independent Living Services	178	233	110	47%	62%	not yet available	98	98	98	100%
# Receiving Meals on Wheels	470	465	374	80%	80%	11	390	401	465	86%
# Seniors Receiving Congregate Meals	1,785	1,000	1,404	140%	79%	78	1,460	1,538	1,200	128%
# Eagle Transit DAR Unduplicated Riders	401	500	331	66%	83%	7	326	333	450	74%
% of Service Recipients at Moderate to High Risk of Institutionalization	89%	88%	92%	105%	103%	93%	87%	93%	88%	106%
Per Meal Cost of Nutrition Services	\$6.89	\$6.75	\$6.29	93%	91%	\$6.80	\$6.52	\$6.80	\$7.00	97%
% Overall Satisfaction with AOA Services from Annual Survey	N = 99%, IL = 96%	95%	N=97% IL=90%			N/A	97% N 97% IL	97% N 97% IL	95%	102%
Maximum annual number of transportation complaints	30	36	12	33%	40%	0	4	4	36	11%
WORKLOAD INDICATOR	FY 2017 Actuals	FY 2018 Target	FY 2018 Actuals	FY 2018 % of Target	FY 2018 as % FY 2017	June	Total Last Report	Total/Avg. to Date	FY 2019 Target	% Target
<b>Outreach/Education/Media</b>						June				
Public Outreach/Education/Media Efforts	123	120	116	97%	94%	9	120	129	120	108%
<b>Nutrition</b>						June				
Total Meals	82,428	79,000	80,639	102%	98%	6,017	72,498	78,515	80,000	98%
MOW	49,695		47,409	N/A	N/A	3,732	42,926	46,658		
Congregate	32,733		33,230	N/A	N/A	2,285	29,572	31,857		
Nutritional Assessments Conducted	2,424	1,550	1,846	119%	76%	127	1,731	1,858	2,000	93%
<b>Transportation</b>						June				
Total Ride Count	85,305	90,000	99,104	110%	116%	10,124	105,893	116,017	90,000	129%
Dial-A-Ride Count	30,025	30,000	31,645	105%	105%	2,008	24,776	26,784	30,000	89%
City, Commuter and Other Ride Count	55,280	60,000	67,459	112%	122%	8,116	81,117	89,233	60,000	149%
Eagle Transit Outreach/Special Events	40	15	42	280%	105%	1	30	31	24	129%
<b>Information and Referral/Assistance</b>						June				
Info and Referral/Assistance Contacts	17,523	18,000	19,429	108%	111%	2,142	23,872	26,014	18,000	145%
<b>Independent Living</b>			93%			June			83%	58%
Homemaker Units of Service	784	2,500	2,005	80%	256%	not yet available	1330	1,330	1,324	100%
Escorted Transportation Units of Service	792	1,739	2,314	133%	292%	not yet available	826	826	1,391	59%
Respite Units of Service	992	2,468	2,079	84%	210%	not yet available	1431	1,431	3,250	44%
Community Support/Senior Companion Units of Service	1,060	1,353	1,310	97%	124%	not yet available	493	493	1,176	42%
Personal Care Units of Service	358	435	231	53%	65%	not yet available	135	135	65	208%
<b>Benefits Counseling</b>						June				
Benefits Counseling Hours of Service	600	450	502	112%	84%	25	1168	1,193	450	265%
<b>Ombudsman</b>						June				
Ombudsman consults/cases opened	1034	1,100	1,250	114%	121%	110	1006	1,116	1,100	101%